Typical Workflow Process
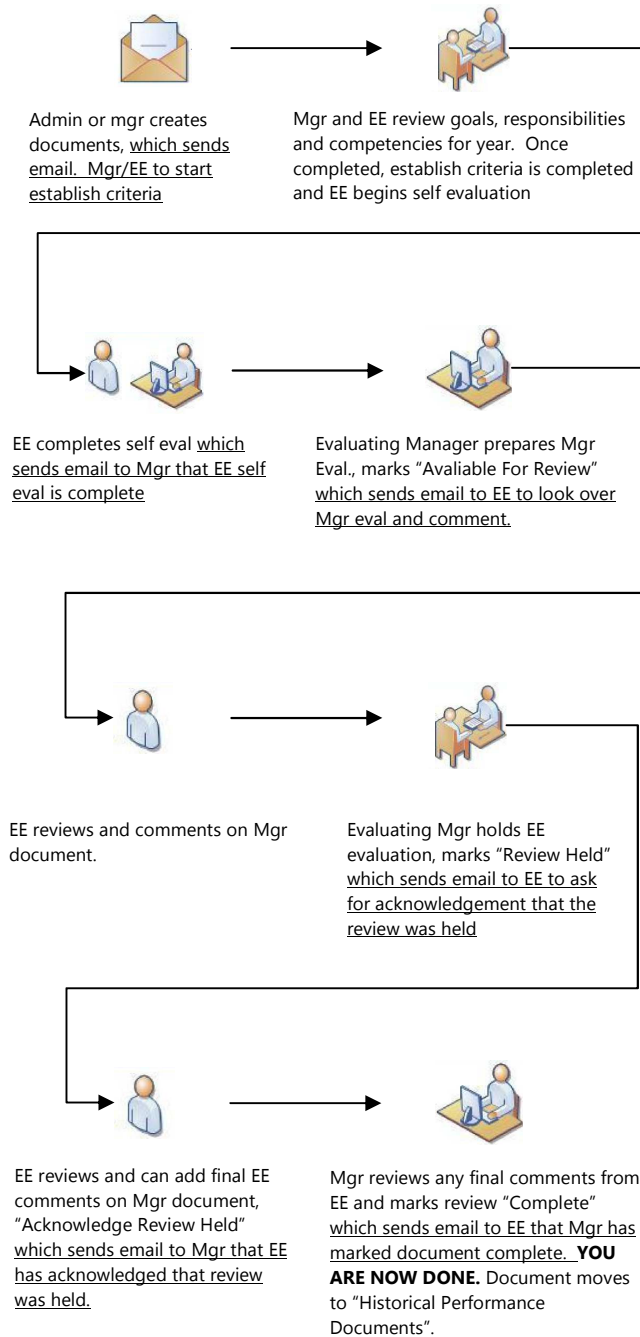
Note: Process may differ between departments. Consult your manager for your specific process

Admin or mgr creates documents, which sends email. Mgr/EE to start establish criteria

Mgr and EE review goals, responsibilities and competencies for year. Once completed, establish criteria is completed and EE begins self evaluation

EE completes self eval which sends email to Mgr that EE self eval is complete

Evaluating Manager prepares Mgr Eval., marks "Avaliable For Review" which sends email to EE to look over Mgr eval and comment.

EE reviews and comments on Mgr document.

Evaluating Mgr holds EE evaluation, marks "Review Held" which sends email to EE to ask for acknowledgement that the review was held

EE reviews and can add final EE comments on Mgr document, "Acknowledge Review Held" which sends email to Mgr that EE has acknowledged that review was held.

Mgr reviews any final comments from EE and marks review "Complete" which sends email to EE that Mgr has marked document complete. **YOU ARE NOW DONE.** Document moves to "Historical Performance Documents".

Rating Scale

Exceptional
Employee exceeded all performance expectations. Employee was an exceptional contributor to the success of his/her department and the State of North Dakota. He/she demonstrated role model behaviors.

Exceeds Expectations
Employee met all and exceeded most of the established performance expectations.

Meets Expectations
Employee met all performance expectations and may have exceeded some. Employee was a solid contributor to the success of his/her department and the State of North Dakota.

Needs Improvement
Employee met most, but failed to meet some performance expectations. Employee needs to further improve in one or more areas of expected job results or behavioral competencies.

Fails to Meet Expectations
Employee did not meet all or most of the established performance expectations. Employee needs significant improvement in critical areas of expected job results or behavioral competencies.
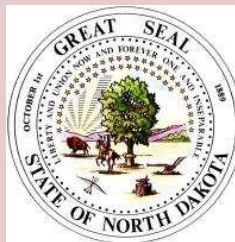
Not Rated
At the agency's discretion, a probationary employee may or may not receive a performance rating.

Rounding Rules

4.5—5.00 = Exceptional
3.5—4.49 = Exceeds Expectations
2.5—3.49 = Meets Expectations
1.5—2.49 = Needs Improvement
0.0—1.49 = Fails to Meet Expectations

Assistance

Please contact your assigned HR Officer for assistance.

North Dakota Performance Management Process

Employee ePerformance Job Aid

This job aid outlines the general steps an employee needs to take in PeopleSoft in ePerformance in order to complete the different phases of the North Dakota Performance Management Process.

Employee's Role

Step 1: Establish Criteria
1. Collaborate with manager to determine the performance expectations (competencies, goals, and responsibilities) for the upcoming plan year.
2. After your manager enters the results of your pre-planning meeting, review the performance plan to familiarize yourself with the final plan.

Step 2: Performance Notes
1. Throughout the plan year, enter performance notes (if desired) to document your activities and accomplishments.

Step 3: Performance Evaluation
1. Complete your self-evaluation in the system.
2. Print a copy (if desired) of your self-evaluation for your records.
3. Acknowledge review was held after your formal evaluation meeting with your manager.
Note: The Mid Year (December - January) and Annual (July) evaluation steps will be the same.

Note: ePerformance is accessed through PeopleSoft Manager Hub/Team Performance or Employee Hub/my Performance.

https://www.cnd.nd.gov/psp/strp/?cmd=login&errorPg=ckreq&languageCd=ENG

http://www.nd.gov/hrms/managers/talentmanagement.html

Step 1—Establish Criteria

Action	Instruction
Log into PeopleSoft and go to Employee Hub	To access screen: my Performance > Current Documents
Enter the document	Click **Annual Performance Review** link for the desired cycle.
View the document	Click **View** on the same line as **Establish Evaluation Criteria**.
Review	Use your scroll bar to navigate the document in order to review the manager's entries.
Exit the document	When you are finished reviewing the document, click **Return to Document Detail** link to exit the document.
Notify your manager	If you notice any discrepancies in your goals and objectives, communicate live or via email with your manager.

Step 2—Performance Notes

Action	Instruction
Log into PeopleSoft and go to Employee Hub	To access screen: my Performance > Performance Notes
Add a new note	Enter From: & To: Click **Add a new note**.
Enter note	Enter a subject and note text.
Complete the note	Click **Save** to exit the note. (Saved will appear in the upper right corner.)

Step 3—Performance Evaluation

Action	Instruction
Log into PeopleSoft and go to Employee Hub	To access screen: my Performance > Current Documents
Access the self-evaluation	Click the **Annual Performance Review** link for the desired cycle.
Enter the form	Click **Start** on the **Complete Self Evaluation** line.
Section 1-3: Enter ratings and comments	Scroll down to each performance expectation in each sections (1-3) and enter your ratings & comments.
Section 4—Policies; Enter comments	For each item in your IDP enter comments on your progress and achievements. Note: This section is not rated.
Complete Performance Plan	You may click **Save** if you wish to exit this phase to return later. OR You may click **Complete** to finish this step.
Confirm and finish	Click **Complete** again and then click **OK**.

Step 4—Acknowledge Review Held

Action	Instruction
Log into PeopleSoft and go to Employee Hub	To access screen: my Performance > Current Documents
Access the document	Click **Annual Performance Document** link for the desired cycle.
Acknowledge review	Click **Acknowledge Review** then **OK** on the next screen.

Step 5—Printing the Evaluation

Action	Instruction
Log into PeopleSoft and go to Employee Hub	To access screen: my Performance > Current Documents
Access the document	Click **Annual Performance Document** link for the desired cycle.
Select the document you want to print	Click **Edit** or **View** on the document you want to print: Establish Evaluation Criteria, Complete Self Evaluation, or Review Manager Evaluation line.
Print	Click the Printer Icon.
Print Set Up	Click the following menu series: File >Page Setup >Landscape >OK.
Print the document	Click File >Print from the menu.

PROCESS FOR EMPLOYEES WITHOUT COMPUTER ACCESS

If you as an employee do not have access to a computer, you can still be actively involved in the performance management process. You can sit with your manager at his/her computer and make changes together. Another option is to work from a printed/hard copy of the performance document. (Step 5 in this document outlines instructions for your manager to print the document.)

The following are some of the changes you can make.

Step 1—Establish Criteria
During the planning stage, you will be provided a copy of your performance plan and will be allowed to write comments and ideas on the hard copy. Then, together with your manager, you will decide what the final plan will look like. After that, your manager will make the final changes to the plan.

Step 2—Performance Notes
You will need to track your own performance notes in a separate paper file.

Step 3—Performance Evaluation
In order for you to complete your self-evaluation, you will need access to a computer or will need to complete your self evaluation on a printed/hard copy of the plan.

Step 4—Finalize Performance Document
After meeting with your manager to discuss your performance evaluation, you will need to sign a hard copy of the evaluation or use your computer to acknowledge your performance review was held.